



REQUEST FOR PROPOSALS FOR OHIO MEANS JOBS
CENTER OPERATORS AND CAREER SERVICES
UNDER THE WORKFORCE INNOVATION
AND OPPORTUNITY ACT

Local Workforce Area 20

Fairfield County ▪ Hocking County ▪ Pickaway County

Ross County ▪ Vinton County

Email Q&A Send to area20rfp@co.fairfield.oh.us

Release Date for Request for Proposal: February 24, 2017

Q&A Dates: February 24, 2017 – March 14, 2017

Deadline for Notice of Intent to Propose: March 14, 2017 @ 4 PM EST

Deadline for Proposal Submission: March 31, 2017 @ 4 PM EST

Operation Start Date: July 1, 2017

1.	Requirements and Specifications.....	4
	1.2. Funding	5
	1.2.1. Funding Overview	5
	1.2.2. Budget Period and Amount	6
	1.2.3. Adult/Dislocated Worker Training Expenditures	6
	1.2.4. Administrative and Program Costs	6
	1.2.5. Allocated Costs	7
	1.2.6. Indirect Costs	7
	1.2.7. Profit/Management Fee	7
	1.3. Scope of Services.....	7
	1.3.1. OMJ Center Operator	7
	1.3.2. Career Service Provider(s) General Duties	10
	1.4. Civil Rights Compliance.....	11
	1.5. Confidentiality and Security.....	11
	1.6. Financial Requirements	11
	1.7. Availability of Funds.....	11
	1.8. Policy Changes.....	12
2.	Provider Proposal.....	12
	2.1. Narrative Proposal	12
	2.1.1. Overview	12
	2.1.2. OMJ Center Operations	13
	2.1.3 Career Services	14
	2.2. System and Fiscal Administration Components	15
	2.2.1. Insurance Certification	15
	2.2.2. Audits	15
	2.2.3. Insurance Certification	16
	2.2.4. Indirect Cost Plan	16
	2.2.5. Subcontracting or Consortium Arrangements	16
	2.2.6. Annual Expenditure and Obligation Requirements	16
	2.3. Cost Proposal.....	17
3.	Proposal Guidelines	17

3.1. Timeline	17
3.2. RFP Contact.....	17
3.3. Notice of Intent to Propose.....	17
3.4. RFP Questions.....	18
3.5. Addenda to RFP	18
3.6. Proposal Withdrawal.....	18
3.7. Prohibited Contacts	18
3.8. Existing or Pending Legal Action Disclosures.....	19
4. Submission of Proposal.....	19
4.1. Proposal Submission.....	19
4.2. Preparation and Number of Copies.....	19
4.3. Proposal Content	20
4.4. Cost of Developing Proposal	20
4.5. False or Misleading Statements	20
4.6. Deadline for Submittal.....	21
4.7. Acceptance and Rejection of Proposals	21
4.8. Proposal Evaluation.....	21
4.9. Proposal Selection.....	22

1. Requirements and Specifications

1.1. Ohio Means Jobs Center and Career Services Request for Proposal Overview

Under the auspices of the Workforce Innovation and Opportunity Act (WIOA), the Area 20 Workforce Development Board (“WDB” or “Board”) of Fairfield, Hocking, Pickaway, Ross, and Vinton counties works in partnership with the Chief Elected Officials (CEOs) of those counties to set the workforce policies for the region. Each county has a CEO that comprises the five-person CEO Consortium. Per the Intergovernmental Agreement of the Area 20 WDB, the Fairfield County Economic Development Department serves as the administrative and Fiscal Agent for the WDB. In its fiscal capacity the state recognizes these five counties as Area 21 while it is commonly referred to its administrative designation of Area 20. For purposes of this RFP the area will be referred to as Area.

This Request for Proposal (RFP) seeks an operator for the One Stops, also referred to as Ohio Means Jobs Centers (OMJs), and career services programs as described in the following materials for the Area 20 WDB. The contracts will be rewarded for July 1, 2017 through June 30, 2018 with three one-year option renewals at the discretion of the CEO Consortium and the WDB. The due date for notification to submit a proposal is March 14, 2017 and the deadline for proposal submission is March 31, 2017.

The Area 20 workforce region is comprised of Fairfield County, Pickaway County, Ross County, Hocking County, and Vinton County. The operator must have a minimum of one physical location in each county. The operator must also offer career services. An organization may bid on operator and career services in each county individually, all five counties in their entirety, or a combination of counties. In the event that no qualifying bids are received for one or more counties, WDB will require the selected operator(s) to serve those counties as well. In such an instance, WDB will negotiate the terms of the additional services and a revised budget with the selected operator(s) to include the additional costs and will amend the contract(s) accordingly.

The Area 20 WDB will accept and consider proposals from for-profit entities and non-profit organizations, including but not limited to governmental entities, community agencies, educational institutions (excluding **traditional** elementary and secondary schools), and faith-based organizations. A consortium of organizations may also bid as long as the proposal clearly delineates the lead organization and the roles and functions it will provide. Service providers must have a proven record of accomplishment in providing the types of services solicited through this proposal and experience in working with the target population specified.

The Area 20 WDB may decide not to fund part or all of a proposal even though it is found to be in the competitive range, if in the opinion of the Board, the services proposed are not needed or the costs are higher than the WDB finds reasonable in relation to the overall funds available. The Area 20 WDB may choose not to award a contract to the respondent(s) with lowest cost or highest rating when taking into account other factors in balancing services to customers.

Any proposal approved for funding is contingent on the results of a pre-award site visit that may be conducted by the Area 20 WDB staff and/or representatives. This site visit will establish, to the WDB’s satisfaction, whether the selected respondent is capable of conducting and carrying out the provisions of the proposed contract. If the results of the site visit indicate, in the opinion of the Area 20 WDB, that the respondent may not be able to fulfill contract expectations, the Board reserves the right not to contract with the organization.

Area 20 WDB OMJ Center and Career Services RFP

The Area 20 WDB will establish an advisory role with the OMJ Center Operators. It will provide direction to the Operator with the expectation that the Operator will fulfill assigned responsibilities and make decisions on day-to-day activities.

Included in this packet are the evaluation criteria to be used in rating proposals. We strongly urge those interested in applying to review them prior to completion of the RFP in order to understand how the contracts will be scored and awarded

1.2. Funding

1.2.1. Funding Overview

The exact funding that will be available for Area 20 OMJ Center Operator and Career Services will not be known until the State of Ohio releases its Program Year 2017 WIOA allocations and Fiscal Year 2018 WIOA allocations. For the purposes of this RFP, respondents should base their budgets on the following figures:

County	Adult Funds	Dislocated Worker Funds	Total Funds
Fairfield	\$153,000	\$207,000	\$360,000
Hocking	\$80,000	\$50,000	\$130,000
Pickaway	\$101,000	\$62,000	\$163,000
Ross	\$190,000	\$120,000	\$310,000
Vinton	\$50,000	\$30,000	\$80,000
Total	\$574,000	\$469,000	\$1,043,000

The goal of this RFP is to secure the best possible service to individuals in our counties seeking employment and training a qualified workforce to meet the needs of local employers. The above estimated funds cover Career Services funding as well as the WIOA allocation used toward operation of the OMJ Center. Funding for the OMJ Center is a combination of WIOA funds as well as partner funds that will be secured through a Memorandum of Understanding (MOU). A separate budget should be created for the Career Services portion of this RFP and the OMJ Operator portion of this RFP. The OMJ Operator budget should include total operating costs and note which expenses will be allocated back to partner agencies through an MOU. Therefore, total funding needed for Career Services and OMJ operation may exceed the above amount, with the understanding that the other costs included in your OMJ Center budget must be recouped through allocations of partners or through the respondent's general funds, separate from WIOA. The maximum percentage of Adult and Dislocated Worker WIOA funding that can be used for the OMJ Center is 30%. Winning bidders must track OMJ Center expenses and Career Services expenses separately.

As a reminder, both the OMJ Center Operator and career services need to be bid on together and bidding can include each individual county, all counties, or a combination of counties within the Area 20 workforce area.

This will be a one-year contract beginning July 1, 2017 with three (3) one-year option renewals at the discretion of the Area 20 WDB and the CEO Consortium. Each year will begin on July 1, which is the beginning of the WIOA program year. The funding amount may increase or decrease during the subsequent years of operation based on the funds available and provider performance. Contracts will describe the terms for renewal but there will be a minimum 90-day notice for renewal. Levels of funding shall not be considered final until all respondent appeals, if any, are decided. Respondents will be notified of an award in writing as soon as the decision is known.

1.2.2. Budget Period and Amount

The total project expenses of the respondent's line-item budget for the first year of services beginning July 1, 2017 must be less than or equal to the estimated total funding available for this RFP as outlined in Section 1.2. The exception is the OMJ Center funding that will be allocated back to partner agencies. Budget forms are provided as **Attachments A & B**. They will be provided as Microsoft Excel documents to any respondents' request.

1.2.3. Adult/Dislocated Worker Training Expenditures

The selected Career Services Provider(s) will be responsible for determining customer eligibility and suitability for enrollment into WIOA training activities. All liability will remain with the selected Career Services Provider(s) for any payments determined to be disallowed for any reason.

1.2.4. Administrative and Program Costs

The selected OMJ Center Operator(s) and Career Services Provider(s) will be responsible for tracking and reporting costs per WIOA regulations. Administrative costs include the following:

- General administrative functions such as accounting, financial and cash management, procurement, property management, personnel management, and payroll;
- Audit functions and those duties associated with coordinating the resolution of findings originating from audits, monitoring, incident reports, or other investigations;
- General legal services;
- Oversight and monitoring of administrative functions;
- Goods and services used for administrative functions;
- Developing systems, including information systems, related to administrative functions; and
- The costs of awards made to subrecipient or vendor organizations for administrative services of the awarding agency (for example, a payroll service for staff or participants).

Please note that the maximum amount to be used for administrative costs is 8%. Program costs are all other costs related to the "direct provision of workforce investment services, including services to participants and employers." Since the goal of this RFP is to secure the best possible service to individuals in Area 20 counties seeking employment and training a qualified workforce to meet the needs of local employers, responders should put an emphasis on maximizing program costs.

1.2.5. Allocated Costs

Respondents are required to describe their “allocation base” in the budget narrative. Examples include direct hours worked, square footage usages, etc. This can be found in **Attachments A & B**. This allocation base describes the existing or anticipated methodology that will be used to prorate common or shared operating costs among projects. Examples of shared operating costs are infrastructure/operating costs (eg., rent, utilities, copier maintenance), as well as personnel (e.g. receptionist, fiscal staff, management) providing benefits to multiple funding sources.

1.2.6. Indirect Costs

Indirect costs are costs incurred by an organization that do not directly benefit any one program or project, but indirectly support all aspects of the organization. Any indirect costs projected to be used by your organization should be noted in the budget and be in accordance with the federal Uniform Guidance. An approved Indirect Cost Rate letter should be included.

1.2.7. Profit/Management Fee

Only commercial for-profit organizations may incorporate profit or a management fee into their budget. Profit must be contained in a single line item on the budget. The maximum allowable profit (NIBT) is 6% of the total funding requested.

1.3. Scope of Services

1.3.1. OMJ Center Operator

The Area 20 WDB has determined that the role of the OMJ Center Operator will be focused on the management of the OMJ Center(s), the coordination of partner activities therein, as well as career services (which are detailed in 1.3.2). The Board will work in an advisory role to the OMJ Center Operator. Duties associated with the operation of the OMJ Centers include, but are not limited to, the following:

- Developing and executing an outreach plan in conjunction with the Board to inform potential adult/dislocated worker job seekers and business customers about OMJ Center services;
- Making routine purchases of supplies and services to ensure the proper levels of equipment, tools, and materials for the OMJ Center Resource Room services;
- Working with the Area 20 WDB staff to design and implement the integration of partners’ staff and systems;
- Coordinating all partner personnel at the OMJ Center to ensure adequate staffing to meet customer needs;
- Ensuring that support is provided to individuals that need help with basic computer skills;
- Coordinating job fairs and other hiring events;
- Determining OMJ Center workshop needs and identifying resources to deliver them;

Area 20 WDB OMJ Center and Career Services RFP

- Establishing operational procedures including days/hours of operation, safety and security protocol, and system for making and tracking partner referrals;
- Gathering and reporting customer feedback and compiling for a quarterly report to the Board;
- Developing partnerships within the OMJ Center to function as a multi-agency team;
- Incorporating Ohio Means Jobs and the slogan “a proud partner of the American Job Center network” in all branding and adjust as required by state or federal mandate;
- Maintaining Equal Employment Opportunity (EEO) compliance;
- Ensuring that the OMJ Center is in compliance with all applicable Americans with Disabilities Act (ADA) guidelines and are easily accessible to individuals with disabilities;
- Monitoring the provider(s) of Career Services and Youth Services once per quarter for all WIOA programmatic compliance, including eligibility requirements;
- Ensuring that all partners co-located at the OMJ Center implement and execute a priority of service for qualifying veterans and/or their eligible spouses, following parameters approved by the Board;
- Training staff to ensure the ability to perform roles, understand policies and procedures, and function within the culture of the organization and community;
- Maintaining acceptable technology to improve efficiency and communication with clients, partners, and the public. Mandatory items include software and equipment in the resource room, online testing sites, and case management software. Preferred items include a local system website and social media;
- Attending any Area 20 meetings as requested by the Board or representatives of the Board;
- Assisting the Area 20 WDB in developing and executing Memorandums of Understanding (MOUs) between required partners to specify how system costs are being shared, how costs are allocated, and which organizations are contributing in-kind services or other resources;
 - The establishment of One Stop delivery systems is addressed in Section 121 of the WIOA Act. The One Stop partners are identified by funding source at 121(b). The partners jointly fund the One Stop center and operator based on the MOU in 121(c). **Attachment C** illustrates the structure of the MOU and lists the required partners. Not all partners are available in all areas, partnership is only required if the partner covers any portion of the service area. **Attachment D** illustrates how the partner can allocate by partner agency. This is not mandatory and would still need to be negotiated as part of the MOU agreement. The successful bidder must be actively involved in finalizing the new MOU by the target date of May 31, 2017, with implementation by July 1, 2017.
 - This MOU was originally developed for 2013-2015 period under WIA and with the change from WIA to WIOA the state recommended extension of this

Area 20 WDB OMJ Center and Career Services RFP

document through June 30, 2017. No further extensions of the MOU are possible and the areas and state are finalizing a template updated to new WIOA language for the MOU commencing July 1, 2017.

- Tracking and reporting of OMJ Center performance per Board requirements;
- Making policy recommendations to the Board;
- Approving and paying invoices for OMJ Center costs;
- Coordinating payments with other OMJ partners;
- Managing fiscal requirements and preparing monthly reports;
- Supplying a quarterly fiscal report that estimates spending through the end of the program year;
- Ensuring data integrity and maintaining confidentiality;
- Notifying the Area 20 WDB staff after confidential data has been destroyed;
- Tracking and managing the costs of the OMJ Centers. This includes personnel costs, infrastructure and other shared costs under the local MOU, and administrative and other costs that are not shared by partners;
- Identifying a physical site in each county in which the bidder has secured to operate as the OMJ Center. Location must be approved by the WDB Board or its representative prior to entering an agreement for the property;
- Providing furniture and equipment;
- Securing insurance for the facility(ies);

The OMJ Center Operator is prohibited from the following activities:

- Convening system stakeholders to assist in the development of the local WIOA plan;
- Preparing and submitting local WIOA plans;
- Overseeing the workforce system;
- Managing or significantly participating in the competitive selection process for the OMJ Center Operator;
- Selecting or terminating OMJ Operator(s), Career Services Provider(s), or Youth Services Provider(s);
- Negotiating local performance accountability measures;
- Developing or submitting a budget for activities of the Area 20 WDB; and
- Receiving OMJ Center certification through the Board.
 - The OMJ Center is certified by a locally identified team;
 - The state has instructed that the certification process will occur in three phases. The state has issued a draft of the certification process which can be found in **Attachment E**. It will be the expected outcome of the OMJ operator to maintain a fully certified One Stop system;

- Fairfield County is to be certified as a “Comprehensive OMJ Center.” Hocking, Pickaway, Ross, and Vinton counties may be operated as “Affiliate OMJ Centers;”
- The certification process may change annually based on state rules.

1.3.2. Career Service Prover(s) General Duties

Duties associated with the provision of Career Services at the OMJ Centers include, but are not limited to:

- Developing and executing a plan to conduct outreach to job seekers;
- Developing and executing a plan to communicate with local businesses and understand their needs for the recruitment of in-demand jobs;
- Providing or arranging provision of other supportive services to businesses as needed;
- Ensuring the provision of all required WIOA career services to customers including meeting minimum enrollment benchmarks for special populations as may be required. This could include participants with disabilities, ex-offenders, veterans, etc.;
- Providing workshops on work readiness as well as job search, interviewing, and basic job skills;
- Helping customers with career exploration and job search activities;
- Participating in job fairs and other hiring events;
- Assessing customers’ skills, abilities, and aptitudes;
- Determining customers’ eligibility for WIOA funding;
- Identifying customers’ supportive service needs;
- Referring customers to partner programs and ancillary services as needed;
- Developing Individual Employment Plans (IEPs) with customers and following through to make sure the plans are executed;
- Enrolling persons in training activities, including Individual Training Accounts (ITAs), work experiences/internships, pre-apprenticeship and apprenticeship programs; On-the-Job Training (OJT); and incumbent worker training;
- Coordinating work-based training activities for enrolled participants, such as OJT, registered apprenticeships, incumbent worker training, and customized training;
- Providing case management and follow-up services;
- Utilizing standardized forms and ensuring they are completed, accurate, and maintained;
- Maintaining staff certifications for required assessment tools;
- Ensuring that Area 20 WDB’s strategic initiatives are implemented;
- Ensuring the proper use of Ohio Workforce Case Management System (OWCMS) for client tracking and case management;
- Collecting and reporting WIOA performance information as requested by the state,

Department of Labor (DOL), and the Board;

- Gathering and reporting customer feedback and summarizing it quarterly for the Board;
- Managing fiscal requirements and preparing monthly and quarterly reports;
- Ensuring there are no conflicts of interest with any clients or vendors;
- Fulfill all state and local mandates and follow through on all requests from the Area 20 WDB;
- Complying with sections 8301 through 8303 of the Buy American Act; and
- Ensuring data integrity and maintaining confidentiality.

1.4. Civil Rights Compliance

All respondents must ensure equal opportunity to all individuals. No individual in Area 20 shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any WIOA-funded program or activity because of race, color, religion, sex, national origin, age, disability, or political affiliation or belief.

All respondents must ensure access to individuals with disabilities pursuant to the Americans with Disabilities Act. All grievances arising out of WIOA or this RFP must be filed according to the Board's established grievance procedures.

1.5. Confidentiality and Security

Any selected Provider or subcontractor engaging in any service for Area 20 WDB requiring them to come into contact with confidential information will be required to hold confidential such data.

1.6. Financial Requirements

The selected provider shall comply with the Administrative Rules and Costs Limitations of the Federal Register, Department of Labor, WIOA upon release of the Final Rules. Provider will be required to have an A133 audit completed annually, pursuant to WIOA rules and regulations.

1.7. Availability of Funds

This RFP is conditioned upon the availability of federal, state, or local funds which are appropriated or allocated for payment of the proposed services. If, during any stage of this RFP and resulting contracting process, funds are not allocated and available for the proposed services as projected here within, the contract will terminate concurrent with the notice of reduction/termination of funding. The Area 20 WDB will notify the respondents at the earliest

possible time if this occurs.

If additional funding becomes available during the term of the contract, and at the Board's discretion, a selected provider's contract may be revised to increase the contract value.

1.8. Policy Changes

This RFP is conditioned upon federal, state, and/or local policy and regulation. If, during any stage of this RFP and resulting contracting process, policy changes occur that would impact how and which services are provided, the Area 20 WDB reserves the right to terminate concurrent with the notice of the policy change. The WDB will notify the respondents at the earliest possible time if this occurs.

2. Provider Proposal

2.1. Narrative Proposal

Attachment F includes an outline of the proposal. Respondents can request the attachment as a Word Document to complete or you can submit separately.

2.1.1. Overview

- 1.** Describe your organization. Include a discussion of the history of your organization as well as a description of any activities similar to or relevant to your proposed program design.
- 2.** State whether your organization intends to subcontract any services under this proposal. If so, the same information provided in response to item No. 1 above must be given for any and all subcontractor(s). Additionally, a letter of commitment from the proposed subcontractor(s) must be included as an attachment.
- 3.** Describe your organization's structure. List the name(s) and title(s) of all the owners, members of the Board of Directors, along with any other officers of the agency, corporation, or business. Indicate owners, or members, or officers who are present members of an OMJ Center or employed by an organization currently participating in any workforce development service or OMJ Center in Area 20; or are related to such individuals. Include your organization's efforts to ensure transparency with the proposed services and to avoid conflict of interest. The same information must be provided for any and all proposed subcontractor(s).
- 4.** Describe your organization's hiring processes, including recruitment, interviewing, initial training, and capacity building activities. Indicate the timeframe expected for new staff to gain proficiency in their hired positions.
- 5.** Describe your organization's experience with managing federal funds, including the experience that fiscal staff employed by the organization have in administering federal funds, and how the organization ensures compliance with federal financial management standards.

Area 20 WDB OMJ Center and Career Services RFP

6. If your organization was ever placed under a correction action plan under WIA or WIOA in the past five (5) years describe how it was remedied.
7. Describe any alternative or leveraged resources, or in-kind contributions, that your organization will commit to Area 20. Include the source and the dollar value.
8. Describe a 60-day transition plan for your organization to begin services on July 1, 2017. Include items such as staffing, identifying and securing space, customer caseloads, marketing and communications plan, etc.
9. Include two organizational charts as attachments. (1) the respondent's current organizational structure and (2) the respondent's proposed structure if awarded Area 20 OMJ Operator and Career Services. Respondents must explain how staffing will be split between the OMJ Center and the Career Services, including percentages of time spent in each role if duties of a single staff member are to be split. If multiple OMJ Center locations are being bid, the respondent must include staffing levels for each.
10. Include resumes and job descriptions for key personnel as an attachment. Include knowledge, skills, and experience of staff related to the requirements of this RFP.
11. Provide three (3) references as an attachment for current or past projects that are similar in scope and size of the services your organization is applying for under this RFP. Include organization name, location, key representative's name and contact information (email and phone) and a brief description of services provided.

2.1.2. OMJ Center Operations

1. Provide an outreach plan to inform individuals and businesses about the services available at the OMJ Center(s). The maximum amount of expenditure is 5% of program funding.
2. Provide a plan to incorporate the services of other partners into the overall customer flow at the OMJ Center(s).
3. Describe how appropriate staffing for the OMJ Center(s), including for the Resource Room and workshops, will be ensured to meet customer needs.
4. Describe how job fairs and other hiring events will be coordinated.
5. Describe how Internal Operational Policies for the OMJ Center(s) will be developed and implemented.
6. Describe how customer feedback will be captured and reported to the Board.
7. Describe how your organization will develop and implement a referral tracking process for the OMJ Center(s).
8. Describe how your organization will utilize technology to enhance and improve OMJ Center services to customers.
9. Describe how EEO and Americans with Disabilities Act (ADA) compliance will be ensured.
10. Describe how your organization will monitor the selected provider(s) of Adult and

Dislocated Worker Career Services and Youth Services for WIOA programmatic compliance.

11. Describe how your organization will coordinate staff training in the OMJ Center(s) to ensure the ability to adequately perform assigned roles, functional knowledge of the policies, procedures and unique characteristics of all co-located partner programs.
12. Describe how your organization will track and report OMJ Center(s) performance to the WDB and others. Include how it will ensure data integrity and maintain confidentiality.
13. Describe how your organization will identify any new and alternative access points for customers.

2.1.3 Career Services

1. Describe the workshops your organization could provide at the OMJ Center(s) and how such workshops would be delivered.
2. Describe how your organization will perform outreach to inform job seeking customers about employment and training opportunities.
3. Describe the intake process that includes eligibility determination. Describe how non-WIOA eligible individuals will be assisted.
4. Describe how career counseling and/or career development services will be provided to participants which results in identification of appropriate and attainable career goals based on the unique characteristics of the individual being served.
5. Describe how assessments will be used to identify academic, employability and occupational interests, aptitudes and skill levels, personal development, and supportive service needs.
6. Describe how IEPs will be developed with customers that address barriers to employment, set specific, measurable, agreed upon, realistic, and time-based goals, and prepare participants for work by developing and improving work readiness skills.
7. Describe how a customer's need for supportive services will be identified. Describe how resources from other community organizations may be leveraged.
8. Describe how customers will be guided toward sustainable career pathways that focus on long-term career goals and upward mobility based on in-demand jobs at a local level.
9. Provide a detailed approach to how WIOA Title II – Adult Ed programs will be engaged in order to ensure access to career pathways for those who lack a high school diploma or equivalent, are determined to be basic skills deficient, and/or lack the digital skills needed to compete in the current workforce.
10. Describe your organization's approach to offering a wide range of training services to participants. Include a description of how a customer's enrollment into training will be determined.
11. Describe any applicable past or current experience participating in pre-apprenticeship or apprenticeship programs, including the specific occupations or sectors that were targeted.

12. Describe how services will be provided to business customers and how you will build partnerships within the business community.
13. Describe how customer feedback will be captured and reported for both job seeker customers and business customers.
14. Describe how job seeker and business services will be coordinated within your organization as well as with partner organizations, including Wagner-Peyser staff.
15. Describe how and what follow-up services will be offered to the individual and to the employer after a customer exits from the program.
16. Discuss how your organization will encourage customers to remain engaged and on their targeted career paths after exiting from the program.
17. Describe how your organization will utilize technology to improve services to customers and businesses
18. Describe your organization's abilities to use Ohio's Workforce Case Management System (OWCMS) to track participants' progress through enrollment, placement, and retention. Include how performance will be reviewed.
19. Describe how your organization will ensure that WIOA funds are tracked and reported according to local, state and federal rules and regulations.

2.2. System and Fiscal Administration Components

2.2.1. Insurance Certification

The respondent must provide a current certificate of professional insurance and commercial general liability insurance with limits of not less than \$1 million.

Prior to the effective date of the contract, selected Provider shall give the County and the Board the certificate(s) of insurance completed by Provider's duly authorized insurance representative, with effective dates of coverage at, or prior to, the effective date of the contract, certifying that at least the minimum coverage required is in effect; specifying the form that the liability coverages are written by endorsement or through issuance of other policy or policies of issuance without thirty (30) days advance written notice. Waiver of subrogation shall be maintained by Provider for all insurance policies applicable to this contract, as required by ORC 2744.05.

During the contract and for such additional time as may be required, the selected Provider(s) shall provide, pay for, and maintain in full force and effect the insurance specified in the contract, for coverage at not less than the prescribed minimum limits covering Provider's activities, those activities of any and all subcontractors or those activities anyone directly or indirectly employed by Provider or subcontractor or by anyone for whose acts any of them may be liable.

2.2.2. Audits

In order to demonstrate fiscal integrity the respondent must include copies of its two (2) most recent independent annual audit reports as well as a statement of cash flow for the 2016 calendar year. For a sole proprietor or for-profit entities, include copies of the two (2) most recent year's federal income tax returns and the most recent year-end balance sheet and income statement.

If no audited statements are available, respondent must supply equivalent financial statements certified by Provider to fairly and accurately reflect the respondent's financial status. Respondent's failure to provide these documents may result in rejection of the proposal and subsequently a contract will not be awarded. Any confidential information such as Tax ID Numbers should be redacted.

2.2.3. Insurance Certification

The respondent shall agree to the items listed in **Attachment G** of this RFP – Assurances and Certifications. This Assurances and Certifications document shall be signed and dated and attached to the respondent's proposal.

2.2.4. Indirect Cost Plan

Indirect costs are costs incurred by an organization that do not directly benefit any one program or project, but indirectly support all aspects of the organization. Any indirect costs projected to be used by your organization should be noted in the budget and be in accordance with the federal Uniform Guidance. An approved Indirect Cost Rate letter should be included.

2.2.5. Subcontracting or Consortium Arrangements

The hiring or use of outside services, subcontractors, or consultants; or the use of consortium arrangements in connection with the work presented within this RFP shall be specifically described in the response. Each entity's roles and responsibilities must be clearly listed. The lead organization must be identified.

2.2.6. Annual Expenditure and Obligation Requirements

Timely investment of funds in the local area is of key importance to the Board. Therefore, the selected respondents will be required to comply with the following guidelines regarding obligation of funds. If these obligation goals are not achieved the Fiscal Agent for the Area 20 WDB has the discretion to shift funds to other counties for their use. These guidelines may be adjusted based on Area 20's fiscal policy.

- 100% of all carry-forward funds must be fully expended or obligated by December 31 of the second year of the funding life cycle, which will be reflected on the January upload. If less than 100% is achieved, the county may be required to release the unobligated balance. The Area 20 Fiscal Agent would have the right to recapture the unobligated balances not voluntarily released.
- 100% of all carry-forward funds must be fully expended by March 31 of the second year of the funding life cycle, which will be reflected on the April fiscal upload. If less than 100% is achieved, the county may be required to release the unobligated balance. The Area 20 Fiscal Agent would have the right to recapture unobligated balances not voluntarily released.

2.3. Cost Proposal

1. Use the budget forms included in this RFP as **Attachment A & B** to provide a cost proposal for the services proposed in the narrative proposal. Once a respondent notifies the Area 20 WDB of intent to submit a proposal the budget forms will be provided as spreadsheets to assist with completion.
2. Please include a narrative which describes each line item included in the budget. Include a description of how the costs were calculated.
3. Discuss your organization’s primary funding sources and how cash flow is sufficient to operate the program on a cost reimbursement basis. Discuss the adequacy of the primary funding so that the organization is not dependent on WIOA funds alone for ongoing operations.
4. Describe what internal controls are in place to compare actual expenditures with the contract budget and to ensure required expenditure levels are met.
5. Describe how your organization will account for costs that may be disallowed.
6. Describe how WIOA funds will not supplant other state or federal funds.

3. Proposal Guidelines

3.1. Timeline

RFP Event	Date
RFP is issued	February 24, 2017
Q&A period	February 24 – March 14, 2017
Deadline for receiving RFP questions	March 14, 2017 at 4 p.m.
Deadline for notice of intent to propose	March 14, 2017 at 4 p.m.
Deadline for proposals received	March 31, 2017 at 4 p.m.
RFP evaluation	April 1 - 14, 2017
Selection of provider	April 19, 2017
Transition period	April 19 – June 30, 2017
Start date of contract	July 1, 2017

3.2. RFP Contact

All inquiries should be emailed to AREA20RFP@co.fairfield.oh.us. This email inbox will be reviewed daily by Angel Conrad, Fiscal Specialist for Area 20, and Rick Szabrak, Executive Director for Area 20. If you do not receive a response within 24 hours, Monday through Friday, please contact us at 740-681-7160.

3.3. Notice of Intent to Propose

Respondents must email their written notice of intent to propose to AREA20RFP@co.fairfield.oh.us no later than 4 p.m. on March 14, 2017. Please include the company name, contact name,

contact title, company address, telephone number, and email address along with a statement listing the county or counties for which you are applying. Please call 740-652-7160 to verify that your notice of your intent to propose was received.

3.4. RFP Questions

Any prospective respondent desiring an explanation or interpretation of the RFP or its specifications must email their questions to AREA20RFP@co.fairfield.oh.us. Each question should include a reference to the applicable page number and section of the RFP. The deadline for questions is March 14, 2017 and all responses will be shared with all respondents that have given an intent to propose their services. Answers to all questions will also be posted on the Fairfield County Economic Development website at www.businesscounty.gov by 4 p.m. on March 20, 2017.

3.5. Addenda to RFP

During the proposal process the Area 20 WDB may modify this RFP by the issuance of one or more addendum(s), up to ten (10) business days preceding the proposal due date. Any modification or amendment will be issued as an addendum to the RFP and will become a part of the contract document. Any addenda issued for this RFP will be posted before 4 p.m. on March 21 at www.businesscounty.gov. All respondents that have submitted an intent to propose will also be notified via email of any addenda.

3.6. Proposal Withdrawal

Respondents may withdraw their proposal(s) at any time before the Area 20 WDB makes its selection of provider(s) by providing written notice to the Board. Withdrawal of a proposal after the selection exposes a respondent to legal liability for sanctions, including costs for re-procurement, or may result in a contract being awarded to the next selected respondent.

3.7. Prohibited Contacts

The integrity of the RFP process is very important to the Board and the County. Behavior by respondents which violates or attempts to manipulate the RFP process in any way is taken very seriously. Neither respondent nor their representatives should discuss the RFP with individuals associated with the RFP process except as noted above. If the respondent attempts any unauthorized communication regarding the RFP the respondent's proposal is subject to rejection.

Individuals associated with this program include, but are not limited to the following:

1. Public officials; including but not limited to the commissioners of Fairfield, Hocking, Pickaway, Ross, and Vinton counties;
2. Area 20 WDB members and employees.

3.8. Existing or Pending Legal Action Disclosures

Respondent must disclose any existing or pending or threatened court actions and/or claims against the respondent, parent company, or subsidiaries. This information will not necessarily be cause for rejection of the proposal; however, withholding the information may be cause to reject the proposal and/or contract.

4. Submission of Proposal

4.1. Proposal Submission

By submitting a proposal, the respondent certifies the proposal and pricing will remain in effect for 180 calendar days after the proposal submission date. Additionally, the respondent will be held accountable to know the specifications and conditions under which the resulting contract will be accomplished, including, but not limited to the contents of all proposal documents, regulations, and applicable laws.

Materials received constitute public information as a matter of statutory law and will be made available for public inspection and copying upon request by members of the public pursuant to ROC 149.43. Any portion of the proposal to be held confidential should be marked “**proprietary**” in the upper right corner and will not be considered public record if it clearly falls within an exemption enumerated in ORC 149.43. Cost proposal pages of the document shall be considered public information.

4.2. Preparation and Number of Copies

1. **Hard Copy Requirements:**

Respondents must submit one (1) original proposal and six (6) exact copies of the original proposal. The original proposal must be marked “original” on the cover and must bear the actual original signature(s) of the person(s) authorized to sign the proposal. Only one copy of the respondent’s audited financial statements is required. This copy should be attached to the original proposal.

Print all narratives on 8 ½” x 11” plain white paper with margins of 1” on each side. All narratives must be printed in single space with Times New Roman (or similar) font, 12-point type. Emphasis should be concentrated in conformance to the RFP instructions, responsiveness to the RFP requirements, completeness, and clarity of content.

Each page of the proposal must be numbered sequentially at the bottom of the page. Any narrative must contain a heading which clearly indicates the subject matter. Respondents may use only paper clips or other removable fasteners to secure their proposal. Do not use staples or binding that cannot be removed.

If choosing to use the Word and Excel templates provided, do not change formatting.

2. Electronic Requirements:

Original proposal should be supplied on a flash drive in a PDF format with files clearly identified and the pages must be numbered.

4.3. Proposal Content

Microsoft Word and Microsoft Excel Templates may be provided for completion of the narrative and budget portion of the proposal. The proposal must be organized in the following manner:

Cover Page	Cover Page form is provided as Attachment H . Must be signed and dated. It can be requested as a Word Document.
Table of Contents	Description of the information contained in proposal and the related page number.
Proposal Narrative	Responses to the items in Attachment F . Can also input into Microsoft Word form that will be supplied based on respondent request.
Required Attachments	<p>Please include the following, as detailed in Section 2.1.</p> <ul style="list-style-type: none"> • Organizational charts • Resumes of key personnel • Job descriptions • List of three references <p>Please include the following, as detailed in Section 2.2.</p> <ul style="list-style-type: none"> • Insurance requirements • Assurances and certifications Attachment G • Indirect cost plan, as applicable • Letters(s) of commitment from subcontractors or consortium partners, as applicable • Copies of Previous Two Year’s Audits
Budget	Complete and submit provided budget form, Attachment A & B . An Excel document can be requested to be completed and submitted.

4.4. Cost of Developing Proposal

No costs will be paid to the respondent to cover the cost of preparing a proposal or procuring a contract for services or supplies pursuant to this RFP. All materials submitted in response to the RFP will become the property of the Area 20 WDB and may be returned only at the Board’s option and at the respondent’s expense.

4.5. False or Misleading Statements

If, in the opinion of the Area 20 WDB, information included within respondent’s proposal was intended to mislead the Board in its evaluation of the proposal, the proposal will be rejected.

4.6. Deadline for Submittal

In order to be considered valid, the entire proposal must be received at the Area 20 WDB staff office by 4 p.m. on March 31, 2017. The address (both mailing and physical) is as follows:

**Fairfield County Economic Development
Attn. Mrs. Angel Conrad
210 E. Main St.
Lancaster, OH 43130**

Proposal packets are to be sealed and each shall bear the name and address of the respondent. Timely submission is the sole responsibility of the respondent. Late proposals will not be considered for contract award. No email, fax, or telephone proposals will be accepted. If mailed, it is the respondent's responsibility to ensure that the proposal was received by the Area 20 staff before the deadline.

It is essential that the respondent carefully review all elements in its final proposal. Once received, proposals cannot be altered; however, the Area 20 WDB reserves the right to request additional information or clarification as may be required.

4.7. Acceptance and Rejection of Proposals

The Area 20 WDB reserves the right to:

1. Award a contract for one or more of the counties in the area;
2. Award a contract for the entire jurisdiction of Area 20;
3. Require a selected operator to serve a neighboring county or counties if no qualifying bids are received for that county or counties. In such an instance, WDB will negotiate the terms of the additional services and a revised budget with the selected operator(s) to include the additional costs and will amend the contract(s) accordingly;

The decision by the full Board shall be final. Waiver of an immaterial defect in the proposal shall in no way modify the RFP documents or excuse the respondent from full compliance with its specifications if respondent is awarded the contract.

4.8. Proposal Evaluation

A committee comprised of members of the Area 20 WDB has been assembled. After the WDB staff reviews the initial submissions to ensure all required documents have been included. All bidders will be notified, in writing, of the results of the technical evaluation. Respondents whose bids have been rejected have the right to protest the decision.

Copies of the proposals will be given to the committee for review and scoring. The scoring sheet can be found as **Attachment I**. Review committee members will determine if additional information is required to complete the evaluation process. Questions will be submitted in writing to the respondent between April 1 and April 12, 2017. Please make sure a contact for

this time period is available for questions. Respondents are asked to reply to any additional questions within 24 hours and supply necessary information within 48 hours or other agreeable term by the committee.

A respondent must achieve a minimum score of 75 to be awarded a contract.

The review committee will make a recommendation to the Board and selections will be made at the Board's second quarter meeting, currently scheduled for April 19, 2017.

4.9. Proposal Selection

Proposal selection does not guarantee that a contract for services will be awarded. The selection process includes:

1. All respondents will be notified within two (2) days of selection.
2. The Area 20 WDB Administrative Agent will work with the selected Provider(s) to finalize the details of the contract to be executed between the WDB and Provider.
3. If the WDB and selected Provider(s) are able to successfully agree with the contract terms, the WDB Administrative Agent has final authority to approve and award contracts. The contract is not final until the Area 20 Administrative Agent has approved the document through public review and the Board's Executive Committee has approved.
4. If the WDB and selected Provider(s) are unable to come to terms regarding the contract in a timely manner as determined by the WDB, then the WDB will terminate the contract discussions with the Provider(s). In such an event, the WDB reserves the right to (1) select another Provider(s) from the RFP process, (2) cancel the RFP altogether, or (3) reissue the RFP as deemed necessary.